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Classification K

Elizabeth Geesey Holmes

University of Georgia School of Law Library

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The authors discuss efforts at the Princeton University Libraries to gain better and more complete control over invoice documents. The Princeton University Accounts Payable Office installed a document management system (DMS) for use as an audit archive. This establishment by the university of digital storage as an acceptable archive medium made it possible for the libraries to explore a similar approach. The goal of the Princeton effort was not to eliminate paper as an archive from the invoicing process. The purpose was greater efficiency.

Interestingly, real efficiencies depended less upon the technology itself than upon staff seeing tangible benefits from the new technology. Once that acceptance was gained, real efficiencies were developed and even expanded. The authors note that the most salutary effects of implementing a DMS to track invoices were not the gains made to date, but the potential for further changes in workflow, greater economies and the expansion of the DMS to other areas of technical services work. They cite the management of licenses for electronic products and the management of approval plan profiles and agreements as areas for further study. As an aside, here at William & Mary, we have taken that extra step and begun managing an electronic archive of licenses and contracts. It has proven very beneficial both as an internal tool, as a means of exchanging information with our campus procurement office, and as a means of responding quickly to issues with vendors.

The authors both state that, faced with the same situation again, they would make the same choice in implementing the system, with the temporary addition of a staff member to compensate for the additional workload at the onset of the project.

On the surface, both of these projects dealt with how digital technologies were impacting acquisitions workflow. Interestingly though, the more important goal of both of these studies was process management. How do we improve upon the acquisitions workflow without detrimentally impacting service and how do we satisfy the record-keeping needs of our organizations and still maintain an efficient operation. Barbara Blummer found that digital technologies complemented but did not replace the need for human interaction in the acquisitions process. Treptow and Lute discovered that digital management of documents generated by the acquisitions process provided opportunities for expanded staff training and development while adding greater transparency to the financial process. Who knows, we all might become a little better by learning from their experience.

Sources

By now, most of us have been using Classification Web for some time, but if you are like me, you could use some reminders about its features and capabilities.

First, if you have not already done so, you should sign up for at least the Class Web Announcement electronic list at http://classificationweb.net/mailman/listinfo/classweb-announce. This low traffic list keeps you informed about the site. You should probably also join the Users Group discussion list, which allows you to communicate with fellow users. Information on these lists and how to sign up for them can be found by clicking on the link labeled User Group near the bottom of the main menu screen in Classification Web.

Second, even if you have already gone through the tutorial, it is worth looking at it again to refresh your memory on all the features of Class Web. Just click on the Tutorial link at the bottom of the Main Menu screen. This Quick Start Tutorial will introduce each feature so that you can get started exploring Class Web on your own. In addition, more detailed descriptions of most features are available at any stage of your Class Web search by clicking on the Help button at the top of the screen. This will give you access to an extensive context-sensitive help system. I tried it out on several screens and there really is a wealth of information not in the tutorial.

Third, remember that there are three different browser views in Class Web: Standard, Enhanced and Hierarchy. When you set your Preferences in Class Web, you can select the one you would like as your default. You can also choose to use a different Browser View temporarily by clicking on the link at the bottom of the Main Menu screen. When I first started using Class Web, I confess that I didn’t trust
that it could calculate numbers in tables correctly so I only used the Standard Browser which displays the classification schedules with links to other areas of classification and to the classification tables. When you click on a table link in the Standard browser, the data on your screen is replaced with the contents of the table just as if you had flipped to the table at the back of the print version. However, once I had tested the Enhanced Browser numerous times, and became used to the look of this display, I reset my preferences and now use this view the most.

The Enhanced Browser adds support for a calculator that automatically merges classification table data into the main classification display. When you click on a table link in the Enhanced Browser, the table is loaded in such a way that the table data appears to be part of the schedule data (including calculated classification numbers). The Enhanced Browser will not automatically apply a table as you navigate through the classification data. You have to click on a table link to open up that table and incorporate it into the display. One benefit of this Browser view is that when you type a number into the “LC Class #” prompt at the top of the screen, the software will automatically apply tables to take you to the most specific record possible within that number.

I am just starting to experiment with the Hierarchy Browser, which is the most complex of the three. As the Class Web documentation states, “you navigate the data hierarchically by moving down one level at a time and by moving up one or more levels at once. Like the Enhanced Browser, when you type a number into the “Class #” prompt at the top of the screen, the software will apply as many tables as necessary to get to the most specific record possible. The Hierarchy Browser keeps track of your current level and limits the display to that many levels of classification data. By clicking on a link that says, “Hide subtopics,” “Show subtopics,” or “Apply table,” you change the maximum depth that the Browser will go when creating the display.” So far I have used this view to browse a particular classification and then “dig deeper” to find specifically what I want.

Another important thing to remember when using the Search menu in Class Web is to check the display options and the search options under the search boxes to make sure you have selected the best options for your particular search. For example, under display options make sure that you select the option to include both tables and schedules when you are looking for law classification numbers that are formed using a table. Remember that tables are used to form all of the classification numbers of the States of the United States and for many other countries of the world. Class Web defaults to searching only the schedules unless you select the option to include tables only or both schedules and tables. Also remember to combine searches to narrow your results, e.g. to search only the States table in KF, enter your term in the keyword box, then enter the table range KFA-KFZ in the Classification number box. Make sure you have selected the option to include both the tables and the schedules, and then click on the Search button.

Finally, one of my favorite features is the subject heading and classification correlation. By selecting the LC Subject Heading and LC Classification Number Correlations option on the Main Menu you can enter an LC Subject Heading and receive a list of possible classification numbers. Click on any of these numbers to go right to the schedule and see if this number is what you are seeking. You can check out possible subject headings for a particular classification number this way too, or you can do so by browsing the schedules for the number in question and clicking on the letter S next to the caption. There are other interesting letter options after the caption, and one I use often is the letter B that takes you to a Bibliographic search of this classification number in any number of online catalogs including your own. This list can be customized in the Preferences for Class Web. I most often use it to search the classification number in our library catalog to get a feel for how it fits into our collection.

Well, I have already written too much, but that just goes to show that there is more than meets the eye to Classification Web. Take some time to explore and it will improve your efficiency in searching and selecting accurate classification numbers. Also, please send me classification questions to answer in future columns.